FIRST 5 COMMISSION OF SAN DIEGO

RFA #40032: BUILDING CAPACITY OF PROGRAMS FOR
CHILDREN 0-5 USING INTERGENERATIONAL APPROACHES
ADDENDUM #1

September 24, 2002

This addendum provides clarification and revisions for materials provided in RFGA #40032 in the following pages. Attached are the following:

- Attachment A: Revisions, Additions and Deletions
- Attachment B: Questions and Answers to the Pre-Application Conference held on September 16, 2002
- Attachment C: Attendee List from the Pre-Application Conference

Please note the changes in Attachment A and make the changes in your RFA package. **The due date remains unchanged.**

Application Due Date: October 8, 2003, 3:00 p.m.

Deliver or Mail Application to: County of San Diego
                                     Office of Purchasing and Contracting
                                     5555 Overland Avenue, Building 11
                                     Mail Stop 032
                                     San Diego, CA 92123

 Applications submitted after the due date and time will not be considered for funding.

Thank you for your ongoing interest in First 5 Commission of San Diego funding opportunities.

Grace Young
Grants and Contracts Manager

Attachment A
FIRST 5 COMMISSION OF SAN DIEGO
RFA 40032 – ADDENDUM #1
Revisions, Additions and Deletions

Note following changes in the RFA #40032:

1. **Section C. Services and Activities to be funded - Outreach, Screening and Training of Senior Mentors (Page 3)**

   - The County of San Diego, Aging and Independent Services (AIS) has developed an Orientation Program Outline. *See Attachment #A1 to this addendum*.

2. **Section D. Level of Funding and Funding Parameters - Stipends and Salaries for Seniors (Pages 4a and 4b)**

   - The 15-20 hour weekly requirement for senior mentors has been changed to 15/30 hours per week or 60-80 hours per month to allow more flexibility in scheduling.

   - An additional stipend level has been added for bi-monthly senior mentor stipends. *See Attachment #A2 to this addendum*.

3. **Section E. Budget - Project Budget Format (Page 5)**

   - The budget format has been revised to include a line item for bi-monthly stipends. *See Attachment #A3 to this addendum.*

4. **Section E. Budget - Project Budget Instructions (Pages 6 and 7)**

   - The Stipends/Salaries subcategory has been expanded to include bi-monthly stipends.

   - The $115 background check per senior mentor has been added under Administrative Costs. *See Attachment #A4 to this addendum.*

6. **Section H – Application Format and Submittal (Page 9)**

   - Applicants shall provide an additional page in their application to be responsive to Section L changes (Supplantation) noted in Item #7 below.

     - Applicants must disclose in their applications whether **the proposed First 5 funded program or service** has received or is receiving funding from other sources (whether local or State government, private, or federal) within the past three

years, and as to any public funding, identify the law or program under which funding was received.

- o This information should be included in a separate page of the application package.
- o If the proposed First 5 funded program or service is not currently or has not received funding from other sources note 'No outside funding received'.

7.   **Section L – Supplantation (Page 11)**

- This new section on supplantation has been added. *See Attachment #A5 for this revised page.*

8.   **Section M – Contract Agreement and Accountability (Page 11)**

- Due to the addition of Supplantation in Section L, the Contract Agreement and Accountability section has been renumbered to Section M. There are no changes in the text otherwise. *See Attachment #A5 for this revised page.*

No other changes have been made.

FIRST 5 COMMISSION OF SAN DIEGO

Building the Capacity of Programs for Children 0-5 Using Intergenerational Approaches

**SENIOR MENTOR AGING & INDEPENDENCE SERVICES ORIENTATION
PROGRAM OUTLINE**

Introduction to First 5 Commission

Suggested Training Modules:
Qualities/Expectations of a Senior Mentor
Intergenerational Programming
Confidentiality/Boundaries
Child Abuse & Neglect
Mandated Reporting for Children and Adults
Stages of Child Development (including issues such as self esteem)
Substance Abuse
Social Security & the Stipended Senior
Dysfunctional Family Issues (i.e. domestic violence, etc)
Cultural Diversity
CalWorks Overview
Problem Solving Techniques

Nuts & Bolts:

Reporting & Record Keeping

Celebration of Completion of Training (including Certificates of Completion)

PROPOSED TRAINING SCHEDULE: 4 half-days of 4 hours per day, to be completed within a 2-week period, prior to the start of volunteer activities.

We anticipate that the trainings will be taking place throughout the County. Ongoing training will be available quarterly to discuss appropriate topics identified by the senior mentors.

Attachment A2 – Revised Page

D. Level of Funding and Funding Parameters

Overview. In the first year, $1.1 million will be available to fund the expansion of current programs and services serving children from the prenatal stage to age 5 by adding or enhancing an intergenerational component.   The funding term will be from January 2004 through December 2004. Funds for two additional option years may be available for those programs that meet or exceed their required objectives.

Minimum/Maximum Awards. An organization may request from $50,000 up to $125,000 to develop and/or expand an intergenerational component that supports the target population.   In the Application, all applicants **shall not exceed** the total dollar amount requested in "The Intent to Apply for Intergenerational Funding Form" submitted to the Commission in August 2003.

When applying as a single entity, organizations may not apply for funding that exceeds 49% of the organization's total operating budget.

Stipends and Salaries for Senior Mentors.   Two options are available for senior mentor stipends- (1) a monthly stipend option, and (2) a bi-monthly stipend option.

Monthly Stipend Option. Seniors may volunteer for 15 or 20 hours per week (60 or 80 hours per month). To create a level playing field between funded projects, the rates for stipends shall be as follows:

♦ Seniors volunteering 20 hours/week (60/80 hours per month) -- Monthly stipend of $300
♦ Seniors volunteering 15 hours/week (60/80 hours per month) -- Monthly stipend of $225

Senior mentors will be required to serve 15 or 20 hours per week. Prorating hours is not allowed.

Bilingual Premium. For bilingual senior mentors, whose bilingual skills will be used to conduct project activities, an additional monthly stipend of $50 will be available.

Supervision Premium. For senior mentors who oversee the work of other senior mentors, an additional monthly stipend of $50 will be available. Senior mentors who are supervisors can only supervise other senior mentors.

Bi-Monthly Stipend Option. Seniors may volunteer for 60 or 80 hours bi-monthly (two months). To create a level playing field between funded projects, the rates for stipends shall be as follows:

♦ Seniors volunteering 60 hours/bi-monthly   Bi-monthly stipend of $300
♦ Seniors volunteering 80 hours/bi-monthly   Bi-monthly stipend of $225

Senior mentors will be required to serve 60 or 80 hours bi-monthly. Prorating hours is not allowed.

Bilingual Premium. For bilingual senior mentors, whose bilingual skills will be used to conduct project activities, an additional bi-monthly stipend of $50 will be available.

Supervision Premium. For senior mentors who oversee the work of other senior mentors, an additional bi-monthly stipend of $50 will be available. Senior mentors who are supervisors can only supervise other senior mentors.

Bi-monthly senior mentors cannot supervise the work of monthly senior mentors, but monthly senior mentors may supervise the work of bi-monthly senior mentors.

Salaries. Salaries may be paid to the seniors who have responsibilities that involve specialized skills, knowledge or expertise. (Seniors receiving a salary would not be receiving stipends, and vice versa.) To create a level playing field between funded projects, the rates for salaries shall be as follows:

- ◆ Seniors working in a professional capacity $10.00/hour
  (not to exceed 20 hours per week)

- ◆ Bilingual seniors working in a professional capacity $12.00/hour
  (not to exceed 20 hours per week)

The intent of the Commission is that salaried seniors should be the exception rather than the rule and should be used sparingly. Professional or highly experienced staff should supervise these salaried senior mentor positions.

Senior mentors who are bilingual <u>and</u> supervise other senior mentors should receive both $50 additional stipends bi-monthly (total $100).

Attachment A3 – Revised Page

1. <u>Project Budget Format</u>:   Complete the budget following the format and instructions below.

LINE ITEM	EXPENSE
1. PERSONNEL- Include FTEs for each position	
(example: .50 FTE Vol. Coordinator)	
Subtotal	
Fringe Benefits @ _____%	
Subtotal: Personnel	
2. **HOURLY SENIOR MENTORS**	
Hrs. @ $10/hr. x (total number of hours), No. of seniors: _____	
Hrs. @ $12/hr. x (total number of hours), No. of seniors: _____	
Taxes, workers' compensation, etc.	
Subtotal: Hourly Senior Mentors	
3. **SENIOR MENTOR STIPENDS**	
Monthly Stipends @ $300/mo. x (number of mentors)	
Monthly Stipends @ $225/mo. x (number of mentors)	
Monthly Bilingual stipends @ $50/mo. x (number of mentors)	
Monthly Supervisor stipends @ $50/mo. x (number of mentors)	
Bi-monthly Stipends @ $300/bi-mo. x (number of mentors)	
Bi-monthly Stipends @ $225/bi-mo. x (number of mentors)	
Bi-monthly Bilingual stipends @ $50/bi-mo. x (number of mentors)	
Bi-monthly Supervisor stipends @ $50/bi-mo. x (number of mentors)	
Subtotal: Senior Stipends	
4. **ADMINISTRATIVE COSTS**	
An administrative fee of up to 5% of the total Hourly and Stipend Costs in Sections 2 and 3 above	
Background Checks @ $115 x total number of senior mentors	
5. **SERVICES/SUPPLIES**	
List appropriate items per instructions	
Subtotal: Services and Supplies	
6. **OVERHEAD** (Up to 15% of total Personnel costs in Section 1 above)	
TOTAL BUDGET	

Attachment A4 – Revised Page

2. <u>Project Budget Instructions</u>:

Budget requests must be within the $50,000 to $125,000 range and total funds requested may not exceed 49% of an organization's total operating budget. The total dollar amount requested cannot exceed the dollar amount requested in the Intent to Apply for Intergenerational Funding form; however, an organization may request less.

Personnel. Provide a line item listing of all personnel (part-time and full-time) to be assigned to your program and fringe benefits for those positions.

Hourly Senior Mentors. Provide line item listings for both $10/hr. and $12/hr. senior mentors, including the total number of hours for each category. Taxes, workers' compensation and other related costs should also be listed.

Senior Mentor Stipends. Please use the formula included in the budget format and indicate the number of senior mentors for each stipend amount.

Administrative Fee. An administrative fee of up to 5% can be added to the total of hourly and stipend costs.

Services and Supplies. Itemize line items that are appropriate to directly support the work of the project. Items such as office supplies, mileage (limited to 36.5 cents per mile), food, printing or copying and other applicable items should be included. Stipend senior mentors are not eligible for mileage reimbursement. Note that any sub-contractors/consultants are to be listed in this section.

Applicants should budget for thorough background checks of senior mentors **at the cost of $115 per senior mentor**, and for the costs to provide insurance coverage, including workers' compensation, general liability and sexual misconduct. If an organization needs to add their senior mentors to an existing policy of insurance, the incremental cost to add that insurance may also be included as a line item in the budget.

Overhead Costs. The allowable overhead rate will be up to 15% of the total of personnel and benefits only. Federally Approved Indirect Cost Rates will not be considered. The Commission reserves the right to audit overhead rates submitted for this program.

Purchase of Equipment. For this RFA, the purchase of equipment will <u>not</u> be allowed using Commission funds. However, an applicant may request an exception to purchase minor (less than $2500) equipment <u>with</u> a justification that demonstrates the direct relationship between the equipment and the project expansion. Equipment purchases approved by Commission staff will become the property of the applicant at contract end provided the applicant can provide assurances that the equipment will continue to be used for the purposes of this program after the Commission funding ends.

Stipends/Salaries.
Senior stipends and salaries shall be calculated as follows:
For monthly stipends:
- $300 per month stipend for 20 hours per week for monthly stipends;
- $225 per month stipend for 15 hours per week for monthly stipends;
- $50 additional stipend per month for senior mentors who are bilingual;
- $50 additional stipend per month for senior mentors who supervise other senior mentors.

Senior mentors who are bilingual <u>and</u> supervise other senior mentors should receive both $50 additional stipends monthly (total $100).

For bi-monthly stipends:
- $300 bi-monthly month stipend for 20 hours per week for monthly stipends;
- $225 bi-monthly stipend for 15 hours per week for monthly stipends;
- $50 additional bi-monthly stipend for senior mentors who are bilingual;
- $50 additional bi-monthly stipend for senior mentors who supervise other senior mentors.

Senior mentors who are bilingual <u>and</u> supervise other senior mentors should receive both $50 additional stipends bi-monthly (total $100).

For salaried senior mentors:
- $10 per hour for professional senior mentors (maximum 20 hours per week);
- $12 per hour for professional senior mentors who are bilingual (maximum 20 hours per .week)

Attachment A5 – Revised Page

L. Supplantation

All applicants must abide by the First 5 Commission's Supplantation Policy, summarized here. The complete Supplantation Policy (#CFC-009) is available on the Commission's website, www.first5sandiego.org.

The Commission's funding decisions are guided, in part, by its Strategic Plan. The Strategic Plan is a multiyear plan that is reviewed annually. The Strategic Plan sets forth the Commission's goals and general areas in which it will provide funding. The Commission's funding decisions are further limited by California Revenue and Taxation Code section 30131.4. That section provides that Commission funds may only be used to supplement existing levels of service and not to fund existing levels of service. Section 30131.4 further provides that Commission funds may not be used to "supplant state or local General Fund money for any purpose." It is the intent of the Commission to ensure that the Commission complies with Section 30131.4 when making its funding decisions.

Applicants must disclose in their applications whether the proposed program or service has received or is receiving funding from other sources (whether local or State government, private, or federal) within the past three years, and as to any public funding, identify the law or program under which funding was received.

Whenever an application discloses that local government funding has been received for the proposed program or service within the last three years, the applicant must also demonstrate to the Commission's satisfaction:

- That the program or service has not received local general funds within the 12 month period preceding the Commission's action; or

- That, if received, such funds have not been reduced during the 12 month period preceding the Commission's action; or

- That the Commission's funds will be used to augment or improve the existing level of service, either in terms of quantity or quality; or

- That the program or service was a pilot project.

M. Contract Agreement and Accountability
Awardees (Contractors) will be expected to sign an agreement between the Contractor and the Commission that specifies the terms and the conditions to be provided, along with specific insurance requirements. An example of the terms and conditions can be obtained from the Commission's RFP/RFA menu.

It should be understood that all contractors will be accountable for ensuring that the funded project activities and proposed results are met in accordance with the contract agreement. There will be a requirement to submit regular reports, both programmatic and financial, in the contract agreement.

FIRST 5 COMMISSION OF SAN DIEGO
RFGA #40032 – ADDENDUM #1
PRE-APPLICATION CONFERENCE
September 16, 2003

Questions and Answers
General Note

Following are the questions that were presented at the Pre-Application Conference on September 16, 2003. Some of the questions and answers have been combined due to the overlapping information. Additional questions have been added that have been forwarded to the Commission office.

General Information

Question: Clarify multi-year contract. If we're awarded for one year, will we have an opportunity to return for funding for years 2 and 3? Are we automatically awarded 2 and 3 years? Do we have to re-apply?

Answer: *This contact is awarded for one year. There will be two one-year options succeeding the fist year for those contractors who have met or exceeded their required objectives. Those contractors would not have to re-apply.*

Question: Is program enhancement available to change audiences served? (i.e., delivering the program currently to parents and proposing to deliver same services to child care workers later on?

Answer: *This question is unclear. If the same services are being provided and meet the requirements of the 0-5 population, the contractor would need to notify the Commission and provide justification for the change. If the question is asking if the Commission would consider 'program enhancement' to be changing the target population later in the contract, then the answer would be no.*

3. Question: Is it possible to lower the age to 55?
   Answer: *No, seniors are adults aged 60 and over as defined by the Older Americans Act.*

4. Question: Does First 5 Commission use "grant" and "contract" interchangeably? What's the difference?
   Answer: *The Commission does not use those words interchangeably. This solicitation will result in a cost reimbursement contract.*

5. Question: Does First 5 Commission require a certain number of seniors per request?
   Answer: *No, it's at the discretion of the organization.*

Question: How many responses did you receive to the announcement letter? How many do you expect to fund?

Answer: The Commission received over 70 responses. Depending on the dollar amount requested per applicant, the Commission expects to fund a minimum of 8 and a maximum of 22 contracts.

Question: Can regular qualitative supervision of senior mentors occur in a group setting or must it be individual?

Answer: It can occur in a group setting.

Question: Please clarify differences between adding a new "intergenerational component" and adding an "intergenerational service enhancement".

Answer: These are 'capacity-building funds' which means using senior mentors to add capacity to serve more children through an existing program, or using seniors to add one or more new services to the same number of children currently being served in an existing 0 to 5 program. If an existing program already utilizes seniors, the application must clearly indicate how capacity is being added by additional seniors to those already working in the program to either serve more children or to add one or more new services.

Question: Is it acceptable to use monolingual mentor volunteers who speak limited or no English?

Answer: Yes, however, bilingual premiums will not be paid to these particular senior volunteers.

Question: Can the number of senior mentors be phased in and increased during the first year?

Answer: Yes, it is expected that many programs will build their senior capacity in the first year. Your budget should reflect the projected total number of seniors anticipated, and the number of months during the first year you expect each of them to receive stipends or salaries. For example, a project may expect to bring on 3 seniors in month 3 of the first year, and 3 more in month 5. In this case, your budget would reflect 3 senior stipend/salaries for 10 months, and 3 senior stipends salaries for 8 months of the 12-month period

Question: What is the definition of 0-5? (Is it inclusive or exclusive of children 5 years old?)

Answer: Historically, the Commission has defined 0-5 as prenatal to 4 years, 364 days. An exception may be considered for pre-school programs (or other programs that serve 4 or 5 year olds as one group) serving 4 and 5 year olds as long as the 4 and 5 year olds are pre-kindergarten.

Question: Are letters of support required to represent a partnership?
Answer: No, they can be included with applications though.

Question: Flexibility of single or double spacing creates inconsistency in information being requested. Specify spacing requirements.
Answer: The County office of Purchasing and Contracting will receive applications for the Commission with either single or double-spaced narratives.

Question: What is the maximum caseload that each senior volunteer carry?
Answer: Each applicant should make appropriate determinations to meet the needs of the program.

Question: Are senior mentors considered volunteers?
Answer: Senior mentors are considered volunteers.

Collaboration

Question: If a partnership is applying, which questions must be answered by all partners? Lead agency?
Answer: The lead agency should respond to all questions .

Question: If an organization has space for the project, participants and office space but another organization has the seniors and the training, is this collaboration?
Answer: If both organizations provide the same services and share resources, then it is collaboration.

Question: Can two organizations offering different aspects collaborate with the same third-party organization?
Answer: An organization may act as the lead in more than one endeavor.

Question: Would you recommend that the lead agency in a collaboration have the strongest experience in serving children 0-5?
Answer: Yes.

Question: If the lead agency is a non-profit, may they provide services to a for-profit child care center?
Answer: Yes. The lead agency must be a non-profit.

Question: Can an organization collaborate with a for-profit entity for medical services?
Answer: Yes. The lead agency must be a non-profit.

Question: Can a non-profit collaborate with a for-profit if the non-profit is the lead fiscal agent?
Answer: Yes.

Stipends and Salaries

Question: Explain stipend. Does it mean one senior at 15 hours equals $225 per month?

Answer: *The purpose of the stipend is to reimburse seniors for their work expenses (i.e., lunch and gas). Seniors volunteering for 15 hours per week would receive a stipend for $225.*

Question: Can we use volunteer seniors without providing stipends? Are paid senior mentors a requirement for this project? Could the non-paid volunteers work less than 15 hours a week?

Answer: *All senior volunteers being utilized in the First 5 Intergenerational Capacity Building Initiative must receive either a stipend or a salary. If a program desir4es to use seniors differently, the seniors are not considered part of this First 5 Initiative.*

Question: If a senior mentor volunteers less than 15 hours per week without a stipend, can their hours be used towards the project?

Answer: *No. Only stipend and salaried senior mentors may be included in the First 5 funded component.*

Question: Can seniors be paid in gift cards, certificates, etc., rather than monetary stipends?

Answer: *Seniors can be compensated by means other than monetary stipends. A description must be included in the application if an organization intends to use this method of payment. The compensation should be dollar for dollar. Other means of compensation shall not be combined with gift cards.*

Question: Will senior mentors be paid for their hours of training? Does the 15 hours per week time requirement apply during training?

Answer: *The program is structured to have seniors attend an orientation before officially signing up to volunteer in this Initiative. Therefore, seniors will not be paid fo their attendance at orientation. Once a senior "signs up", all of the development/training offered is considered part of the volunteer's 15 or 20 hours/week time commitment.*

Question: Can multiple agencies share a senior and share the hours for a senior?

Answer: *Yes, as long as the total stipend for that senior is paid by one organization and included in that organization's approved budget.*

Question: Can the monthly stipend be called a "per-diem"?

Answer: *No.*

Question: Can someone work one week per month for four months and receive a $300 stipend?

Answer:	*No. The senior mentor must meet the minimum time requirements. Please see the Bi-Monthly Stipend Option (Attachment A2).*
Question:	Can an organization have both unpaid volunteers as well as seniors who receive hourly salaries or stipends?
Answer:	*Yes; this is at the discretion of the organization. See the answer to question #24.*

Budget

Question:	What percent of the overall budget should be dedicated to the recruitment of senior mentors?
Answer:	*The percentage amount is at the discretion of the organization.*
33. Question:	What will the contract pay for?
Answer:	*The list of allowable costs in the Project Budget Instructions is provided in Section E of the RFA.*
34. Question:	How should an agency budget for recruitment knowing that AIS will also provide recruitment?
Answer:	*See Question #52 regarding recruitment to assist applicants in determining the dollar amount to budget for recruitment expenses.*
35. Question:	Is rent an allowable cost?
Answer:	*In most cases, no. Rent is only an allowable cost if the organization clearly demonstrates and justifies in the application that there are additional rent cost directly related to the new capacity being proposed.*
Question:	Define "pro-rating".
Answer:	*"Pro-rating" offers part of a stipend for less hours worked and is not allowed under this RFA.*
Question:	Can "thank you" items for unpaid volunteers be factored into the budget?
Answer:	*No.*
Question:	Due to required additional costs (such as background checks), will the Commission allow applicants to exceed original estimated funding amounts?
Answer:	*The funding amount requested in the Notice of Intent cannot be exceeded.*

Senior Hours

Question:	Can the number of hours of commitment for mentors (ranging from five hours to 20 hours) be amended?
Answer:	*See the revised Bi-Monthly Stipend Option (Attachment A2).*

Question: Can an agency facilitate a volunteer program for 15-20 hours a week during an 8-week term to expand intergenerational recruitment? Is reduced time available?

Answer: The senior mentor must meet the requirements of the monthly or added bi-monthly option. See the revised Bi-Monthly Stipend Option (Attachment A2).

Question: Is there a requirement for a minimum number of hours and weeks per year?

Answer: Please see the revised Bi-Monthly Stipend Option (Attachment A2).

Question: What happens if a senior is unable to work due to vacation, illness, holidays, etc.? What happens to the stipend when the 60-80 hour requirement is not met for two or three months during the contract period?

Answer: The stipend cannot be prorated. See the bi-monthly option as an alternative. (Attachment A2) Stipends can be suspended for an entire month or months if no work is contributed (due to illness or vacation).

Question: If seniors are sick, or can't meet monthly hours can we give them a portion of the stipend?

Answer: No. Stipends cannot be pro-rated. See the answer to Question #42.

Question: Clarify that an intense home visiting mentoring model could include varied activities to average 15 hours a week?

Answer: Senior mentors can perform more than one type of activity. It is up to the applicant to determine the types and ranges of responsibilities assigned to the senior mentors.

Transportation

Question: Can an organization include mileage for the non-stipend, non-hourly seniors that are part of the program? What is the mileage reimbursement for non-paid seniors?

Answer: Mileage reimbursement is only offered to salaried senior mentors.

Question: If senior mentors are ineligible for mileage, are transportation costs allowable? (i.e., transporting seniors off site for the project?) Can the agency provide transportation to stipend seniors through the hourly seniors or senior staff? If an agency transports the senior volunteers, can that mileage/vehicle use be charged to Services and Supplies?

Answer: Transportation costs are allowable under Services and Supplies. Non-paid, non-stipend mentors are not eligible for mileage reimbursement under this RFA. Transportation services should not be provided by salaried seniors.

Question: Can unpaid volunteers receive compensation for travel expenses to and from the program location?

Answer: No.

Aging and Independence Services: Recruitment, Screening & Training

Question: Will seniors be required to go through AIS training?
  Answer: Yes, all volunteers will be required to attend the AIS Senior Mentor Orientation program.

Question: Please clarify specific information on the type of training AIS will provide.
  Answer: Please refer to the attached training outline for the Senior Mentor Orientation program. (See Attachment A1.)

Question: Clarify the recruitment role of AIS – will they work with organizations to target areas and specific needs?
  Answer: AIS will conduct a comprehensive volunteer recruitment program by performing targeted community outreach through the RSVP (Retired Senior Volunteer Program) and the Outreach and Education staff. AIS will work with contract recipients to target areas of specific need. In addition, AIS staff will promote program participation through the AIS and Network of Care websites, by means of AIS newsletters (circulation 5,000) and brochures, as well as other community publications, especially those that may be specific to retired seniors. AIS will also provide outreach through Aging Network (500 members), and by AIS staff participation in various community events, health fairs, and networking meetings.

Question: How many hours of training are required? Where will it be held?
  Answer: AIS will conduct an initial 16-hour orientation program that will be required for all volunteers, prior to seniors being selected for a program as a senior mentor. The Orientation program will be offered in several locations throughout the County to accommodate the needs of volunteers, however, specific locations have not yet been identified. The 16-hour orientation does not come under stipend or salary.

Question: What will AIS screening entail? Is it something organizations should be concerned about? What specific qualifications will seniors need to have?
  Answer: Screening will begin with completion of a standardized application, developed by AIS. Participating programs will be required to interview and place the volunteer candidates for work in the specific program as a senior mentor. Once accepted to work in a program, and prior to beginning the senior mentor work, the senior mentor candidates will be required to complete the initial AIS Orientation program, followed by a background check.

  There are no specific qualifications required for seniors to participate as senior mentors, such as a particular employment

history or specific skills. General and varied life experience, as well as a keen desire to work with children, is the foundation for a mutually beneficial volunteer/program relationship.

Question: What training is required by AIS? What will the general training and the specific training address? Please provide an outline of the AIS training. What is the timeframe for recruitment and training? How many training hours does AIS require? Can individual organizations recruit and train their own volunteers? Is training mandatory? Is training available in multiple languages? Does training time count against volunteer hours?

Answer: Please refer to the attached training outline for responses for a description of the AIS Orientation program.

Recruitment activities will begin in late Fall 2003, with a concentrated effort to outreach to specific communities once contracts have been awarded. The initial AIS Senior Mentor Orientation Program will take place in January 2004.

AIS will assist all selected contractors in recruiting and training volunteers. The AIS recruitment and training program is not intended to supplant the volunteer recruitment and training that will be conducted by the contractors. Therefore, it is the expectation of AIS that the contractors will also work to recruit volunteers, as well as develop specialized and program-specific orientation and training on-site, to help the senior mentors to perform the job duties, as required by the program,

AIS does not have the capacity to provide volunteer orientation in multiple languages; however, we will explore any possible means to potentially accommodate the mono-lingual, non-English speaking volunteer, to the extent that resources may be available.

The initial 16-hour Orientation program will be conducted prior to volunteer service. Follow-up training for the senior mentor, to be presented throughout the year, would count as volunteer time.

Question: If our agency recruits seniors, will we turn them over to AIS for screening and training? What is the recruitment strategy? Will AIS bear the cost of recruitment?

Answer: All volunteers will need to complete a standardized application developed by AIS, complete the 16-hour AIS Orientation program, and pass a background check, prior to working in an agency. AIS will bear the cost of recruitment activities performed by AIS, as outlined in response to question #49.

Question: Is AIS recruitment, referral, and training mandatory?

Answer: Completion of the AIS Orientation program is mandatory for all volunteers. Recruitment will be a joint responsibility of the agency and AIS. Agencies may choose to recruit all of the volunteers necessary for their programs, without AIS recruitment assistance,

however, all volunteers will be required to complete the standardized application, AIS Orientation program, and pass a formal criminal background clearance.

56. Question: Will the training provided by AIS be in Spanish? Will AIS provide interpreters to non-English speakers in training?
    Answer: *Please refer to the response for question #52.*

57. Question: Can you define acceptable duties for senior mentors beyond training and direct interaction with children? Can seniors help with educational outreach on the specific program they are involved in?
    Answer: *Senior mentors should perform duties that are commensurate to their vast years of experience and education. Duties such as copying and stuffing envelopes are not allowed. The intent of intergenerational programming is that the senior is working in meaningful activities with children. Seniors can assist with outreach for the specific program where they are working.*

Question: Please define how applicants should incorporate AIS standards and training into our RFA responses.
    Answer: *Refer to the responses to the questions in this section titled "Aging & Independence Services: Recruitment, Screening & Training" for a description of AIS' role.*

Question: Will AIS be able to help with AIS volunteer retention? If so, how?
    Answer: *AIS will assist by providing quarterly trainings to discuss appropriate topics identified by the senior mentors.   We have found that paying stipends increases volunteer retention as well. AIS will promote the linkage with DOVIA (Directors of Volunteers in Agencies) who will assist with all aspects of volunteer management. In addition, AIS will be available to contractors as consultants for all activities associated with intergenerational programming and volunteer coordination.*

Question: Is AIS prepared to pool senior volunteers who are willing to integrate into an organization's programs for babies and toddlers?
    Answer: *This question is not clear. If the question is asking whether or not senior mentors would be interested in working with babies and toddlers, the answer is an emphatic yes.*

Question: What approach will be taken to recruit senior volunteers?
    Answer: *Please refer to the response for Question #52.*

Question: How many hours of technical assistance will AIS provide?
    Answer: *AIS will provide technical assistance, as needed, to all grant recipients, specific to the concept of intergenerational programs and volunteer recruitment and coordination.*

Evaluation

Question: How are the outcome indicators being measured in comparison to the evaluation criteria? Do we measure pre- and post-services?
Answer: Please see Section III, Item 7, Program Information, of the application. The Intergenerational opportunity is a capacity building effort. The Commission's independent data evaluator will work with organizations to develop an evaluation plan.

Question: Are evaluation costs allowable? (Hire an evaluator?)
Answer: Evaluation costs of up to 5 percent of the total budget may be included.

Question: In the Evaluation Criteria, are the bullets listed in descending priority or equal priority order?
Answer: The three categories of the evaluation criteria are listed in descending order of importance.

Question: Are impact outcomes required for senior mentors?
Answer: This is not a requirement at this time; this activity may be funded in the future and programs are encouraged to capture these impact outcomes if they are available.

Question: Will the evaluation only cover those seniors who invest 60 or 80 hours to their assigned children?
Answer: Evaluation will cover all seniors participating in this Commission-funded initiative.

Legal and Taxes

Question: If seniors are receiving SSI, how does this affect their SSI payments? Will their SSI payments be reduced by the amount of the stipend?
69. Question: What are the tax implications of senior stipends?
70. Question: Is an organization required to pay worker's comp insurance if that organization doesn't already provide worker's comp for any volunteers?
Question: Does labor law require paying worker's comp for stipend recipients? How does this affect the budget?
Question: By requiring a minimum number of hours for the stipend, it appears the Commission has created a salaried employee. If the stipend under IRS and CA Dept. of Labor is for the cost of being a volunteer and not for reimbursement of time, shouldn't the Commission suspend the minimum time requirement for volunteers?

Answers to Questions 68 through 72:

Since each volunteer's financial situation can differ, the Commission is not in a position to provide a blanket answer to these questions. During the AIS orientation, seniors will be provided with resource information so they may personally assess their situations and make their own choices. Neither the Commission nor AIS is responsible for the financial impacts of the stipends and salaries on the volunteers.

Questions relating to labor law and workers' insurance comp need to be researched through each awarded organizations' legal counsels. Note per Question #15 that senior mentors are considered volunteers.

ORGANIZATION	ATTENDEES	PHONE #
Alpha of San Diego, Inc.	Don Verry	(619) 285-9999
Bayside Community Center	Debra Fitzgerald	(858) 278-0771
Bonita Country Day School	Suzanne Catanzaro	(619) 656-0141
Bronze Triangle Comm. Development Corp.	ILLEGIBLE	(619) 233-1385
Casa de Amparo	Deborah Stanley	(760) 754-5500
Catholic Charities, Diocese of San Diego	Sharin Yetman	(619) 231-2828
Challenge Center	Mary Hardison	(619) 667-8644
Chicano Federation of San Diego Inc.	Ida Cross	(619) 236-1228
Children Having Children, Inc.	Diane Moss	(619) 262-2022
Children, Youth & Family Network	Karen Wells	(858) 560-2626
Children's Dental Health Assn. Of San Diego	Dr. Patricia Billings, DDS, Kimberly	(619) 234-8131
Chula Vista Elementary School District	ILLEGIBLE	(619) 425-9600
Combating Literacy	Susanne Cyrus	(858) 717-4999
Family Literacy Foundation	Britta Justesen	(858) 481-7323
Grossmont Cuyamaca Comm. College District	Lois Knowlton, Sheridan DeWolf	(619) 644-7716
Healthy Start Military Family Cluster	Rachel Burnage	(858) 496-0044
Heartbeat Family Partnership	Daphyne Watson	(619) 477-0757
Home Start, Inc.	Cindy Grossman, Sharon Hudnall	(619) 692-0727
Homeys Youth Foundation	ILLEGIBLE	(619) 269-1554
Horn of Africa Comm. in North America	ILLEGIBLE	(619) 583-0532
INFO LINE of San Diego County	Shannon Anglea, Heather Grant	(858) 300-1300
Insight Vision Center	Anastasia Sanders & Dr. Mary McMains	(619) 229-3966
International Rescue Committee	Sharon Kennedy, Colleen Krause	(619) 641-7510
Jewish Family Service of San Diego	Yve Skeet	(619) 291-0473
La Maestra Family Clinic	Theresa Bagg	(619) 584-1618
Labor's Community Service Agency	Isabelle T. Perez	(858) 277-9962
Multicultural Community & Family Services	Amaka Okeke	(691) 464-6417
Oaks & Acorns	Daken Sinclaire	(619) 298-0750
PALs Healthy Network	Ethel E. Sims	(619) 234-7271
Regents of the University of California - UCCE	Sue Mangelallan, Lori Renstrom	(510) 987-0050
Saint Stephen's Cathedral	Elder W.H. Nichols	(619) 527-3227
Salvation Army Door of Hope Haven Program	Lynn Sharpe-Underwood	(858) 279-1100
San Diego Birthing Project	Cynthia Boyd	(619) 264-3558
San Diego Centers for Education/Technology	Roma Weaver & Pat ILLEGIBLE	(619) 388-4950
San Diego County Breastfeeding Coalition	Eve Moeren	(858) 966-5981
San Diego Reads	Lew Witherspoon	(619) 296-0820
San Diego Youth & Comm. Services, Inc.	Barbara Hansen, ILLEGIBLE	(619) 221-8600
Santee School District	Hope Baker	(619) 258-2350
SDSU - Dental Health Initiative	Susan Stewart	(619) 594-5731
SDSU – Exceptional Family Resource Center	Sherry Torok	(619) 594-5731
SDSU – KPBS	Cathy Lloyd	(619) 594-5731
SDSU - WIC Program	Veronica Wells	(619) 594-5731
Shiley Eye Center	Linda Field	(858) 534-9671
So. California Am. Indian Resource Center Inc.	Myrtle Casselli, Wanda Michaelis	(888) 217-2247
Social Advocates for Youth (SAY San Diego)	Ellen Yaffa	(858) 565-4148
South Bay Union School District	Susan Schmidt, Reina Menasche	(619) 628-1683
St. Clare's Home/Little Angels' Learning Center	Luellen Reese	(760) 741-0122
Therapeutic Services, Inc.	Dana Nitti, Jan Jacobsen, ILLEGIBLE	(858) 277-9550
Travelers Aid Society of San Diego, Inc.	Kathleen S. Baldwin	(619) 295-8393
Union of Pan Asian Communities	Irene Linayao-Putman	(619) 232-6454
Vista Community Clinic	Brenda Balmer	(760) 631-5000
Vista Townsite Community Partnership	Peg Martin	(760) 806-8980
YMCA - Youth & Family Services	Edna Lyons, Melanie Keating, A. Moore	(858) 292-4034